

— AI COMPANY ASSESSMENT

AI Tools Assessment

Prepared for Meridian Property Group

Assessment Date: 2025-10-18

Your 45-Minute Assessment

During our call, managing broker Danielle Park walked us through Meridian's operations across the 12-agent brokerage. Here's what stood out:

- **Listing copy is a time sink.** Each agent writes 3-4 MLS descriptions per week from scratch, plus Instagram captions and email blasts. Danielle estimated this eats 6+ hours/week across the team — and the quality is inconsistent.
- **Client follow-ups are falling through the cracks.** After showings and buyer consultations, there's no system for capturing what was discussed or what the next step should be. Agents rely on memory and sticky notes.
- **Inboxes are overwhelming.** Between lender updates, title company docs, vendor pitches, and client emails, agents are losing important communications in the noise. Danielle said "we've missed two inspection deadlines this year."
- **Weekly marketing reports take a full afternoon.** One person manually pulls data from Zillow, Realtor.com, Google Ads, and Instagram to build a performance spreadsheet for the Monday broker meeting.

Current tools: Gmail, Google Calendar, Google Sheets (as CRM), Zillow Premier Agent, Canva

Bottom line: we found **20+ hours/week of recoverable time** across the brokerage.

Impact-Effort Matrix

Your pain points mapped to four quadrants. This report focuses on Quick Wins — high value, low effort.

Quick Wins

HIGH IMPACT · LOW EFFORT

Major Projects

HIGH IMPACT · HIGH EFFORT

Ignore These

LOW IMPACT · LOW EFFORT

Fill-ins

LOW IMPACT · HIGH EFFORT

Quick Wins

- 01 Listing copy written from scratch → Claude Pro
- 02 No meeting notes or follow-up tracking → Fathom
- 03 Inbox overload across 12 agents → SaneBox
- 04 Marketing reports compiled by hand → DashThis

Major Projects

- 01 GoHighLevel CRM migration
- 02 Custom MLS market report agent

Quick Wins

01

6+ hours/week writing listing descriptions, captions, and emails

CLAUDE PRO

Set up a brand voice project with Meridian's tone, style guide, and listing templates. Agents paste in property details and get polished MLS descriptions, Instagram captions, and email blasts in seconds — all on-brand.

Complexity: **some setup** Cost: **\$20/user × 4** Setup: **1-2 hrs** Time Saved: **8 hrs/week**

02

Client follow-ups relying on memory and sticky notes

FATHOM

Auto-joins every client call and showing debrief, captures transcripts, and extracts action items. Agents never lose a follow-up or forget what a buyer said they wanted. No more missed inspection deadlines.

Complexity: **plug-and-play** Cost: **\$19/user × 3** Setup: **15 min** Time Saved: **4 hrs/week**

03

Important emails lost in vendor spam and newsletters

SANEBOX

AI inbox triage for your busiest agents. Client offers and lender updates surface first; vendor spam disappears. Danielle mentioned two missed deadlines this year — SaneBox prevents that.

Complexity: **plug-and-play** Cost: **\$7/user × 4** Setup: **10 min** Time Saved: **4 hrs/week**

04

Full afternoon every week compiling marketing performance data

DASHTHIS

Consolidates Zillow, Realtor.com, Google Ads, and social analytics into one auto-updating dashboard. Monday broker meetings start with data, not a scramble to build a

Your 4-Day Quick Wins Plan

DAY 1

Set up Claude Pro, create Meridian brand voice project with listing templates

Claude Pro · 1-2 hrs

DAY 2

Set up Fathom for top 3 agents, connect to Google Calendar

Fathom · 15 min

DAY 3

Roll out SaneBox for the 4 highest-volume agent inboxes

SaneBox · 10 min

DAY 4

Set up DashThis, connect Zillow + Google Ads + social accounts

DashThis · 1-2 hrs

— FINANCIAL IMPACT

The Math

Based on \$100/hour loaded employee cost · 4.33 weeks/month

TOOL	TIME SAVED	MONTHLY VALUE	MONTHLY COST
Claude Pro	8 hrs/week	\$3,464	\$80
Fathom	4 hrs/week	\$1,732	\$57
SaneBox	4 hrs/week	\$1,732	\$28
DashThis	4 hrs/week	\$1,732	\$42
Total	20 hrs/week	\$8,660	\$207

MONTHLY NET ROI

\$8,453

ANNUAL NET ROI

\$101,436

PAYBACK PERIOD

< 1 week

What Comes Next

Once quick wins are running, these high-impact projects are worth scoping.

GoHighLevel CRM + Automated Nurture

Replace Google Sheets with a real CRM. Automated drip campaigns, anniversary reminders, and re-engagement sequences that keep Meridian's past clients coming back — without agents remembering to follow up manually.

\$5K – 8K 3-4 weeks

Custom MLS Market Report Agent

An AI agent that pulls MLS data weekly, generates neighborhood-level market summaries, and emails them to Meridian's client list — branded with your logo, colors, and broker commentary.

\$6K – 10K 2-3 weeks

Transaction Coordination Automation

Automated checklists, deadline tracking, and document routing from offer to close. Every agent and every deal follows the same process — no more missed inspection deadlines.

\$4K – 7K 2-3 weeks

— YOUR NEXT STEPS

Start Monday.

1

Implement the 4 Quick Wins

Follow the 4-day plan to give your brokerage 20 hours/week back. Total setup time: under 5 hours. Your agents focus on closings, not admin.

2

Schedule a 30-minute Review Call

Two weeks after implementation, we'll review what's working and scope the CRM migration and market report agent if you're ready for phase two.

[Schedule Your Review Call →](#)